EASIV Repository II: Advanced Business Objects and Metrics

AUSA Conference

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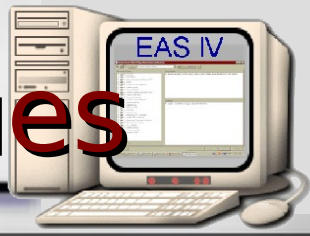
SRA International, Inc

Selected Advanced Techniques



- Linking Reports
- Prompts
- Creating new variables
- Calculations
- Slice and Dice
- Graphs

Hands-on Application Scenario

Linking Separate Queries

- Key data values pertinent to TFL and other analyses include total ambulatory expenses and their pharmacy expense component by Fiscal Month.
- Because of Class compatibility, two separate queries must be performed.
- A more efficient approach is to link the two separate queries by a common variable – Parent DMIS ID and Fiscal Month.

EAS IV Repository Universe

Principal Class	Context	Classes																								
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
02	Load Status	X	Y																							
06	Expense Detail	X		X	X	X	Y					X														
07	Personnel Detail	X		X	X	X		Y				X														
09	Expense Allocated	X		X	X	X			X	Y		X														
10	Personnel Allocated	X		X	X	X			X		Y	X														
11	Account Subset Definition			X	X							Y														
12	Service Unit Cost Detail	X		X	X							X	Y													
13	Patient Acuity	X		X	X							X		Y												
14	DRG Cost FCC	X		X	X							X			Y											
15	Data Sets	X		X	X							X				Y										
16	Expense Pure	X			X												Y									
17	Ambulatory CPT Workload	X		X	X							X						Y								
18	Ancillary CPT Workload	X		X	X							X							Y							
19	Respiratory Therapy/ Pulmonary Functior	X		X	X							X								Y						
20	FCC Expense Summary	X		X	X							X									Y					
21	FCC Summary	X		X	X							X										Y				
22	Facility Summary	X			X																		Y			
23	Transmission Job	X			X																			Y		
25	Ambulatory Summary (No CPT)																									Y

- ***X's in the matrix indicate compatible classes – your queries can contain objects from compatible classes only***
- ***Y's identify principal classes – you must select objects from the principal class first, followed by other compatible classes***

Scenario

- You are interested in evaluating the FY2004 Pharmacy expense per Pharmacy Weighted Procedure by Fiscal Month at NH PENSACOLA (DMIS ID 0038) and NH JACKSONVILLE (DMIS ID 0039) .
- This is a metric you need to execute on a regular basis, so you prefer to build a linked query including a line graph.
- Enter a prompt for the Parent DMIS ID so you can easily update with any MTF's data.

Linking Separate Queries

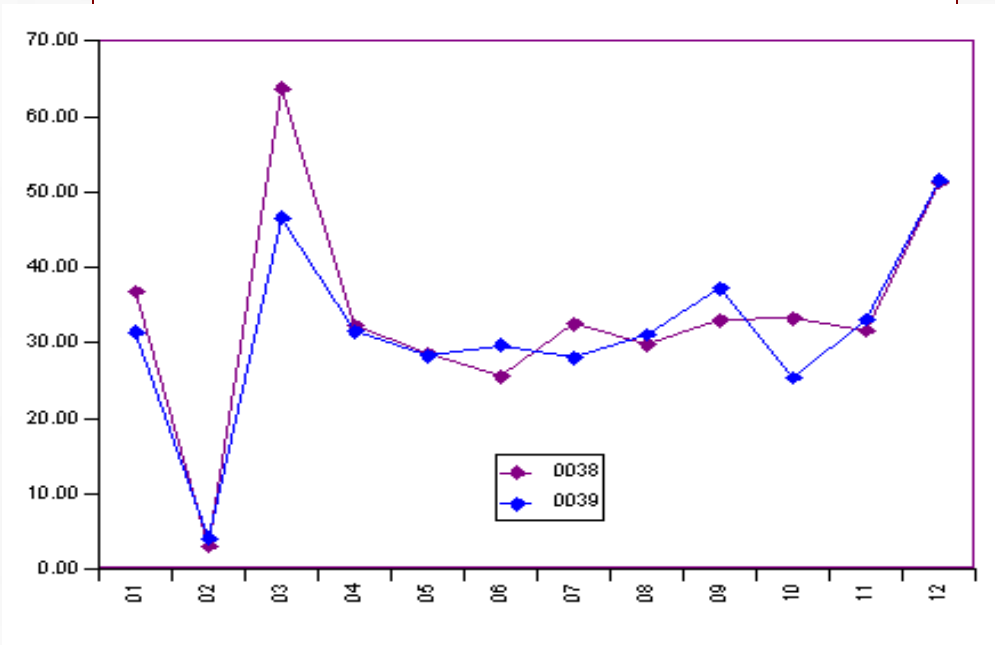
This report shows Cost per Weighted Procedure and their Pharmacy expenses separately identified by Fiscal Month.

Fiscal Year(RX Weighted Procedures in B)	Parent DMIS ID(RX Weighted Procedures in B)	Fiscal Month(RX Weighted Procedures in B)	Cost per Weighted Procedure
2004	0038	01	36.79
2004	0038	02	2.98
2004	0038	03	63.68
2004	0038	04	32.23
2004	0038	05	28.50
2004	0038	06	25.50
2004	0038	07	32.47
2004	0038	08	29.71
2004	0038	09	32.94
2004	0038	10	33.22
2004	0038	11	31.58
2004	0038	12	51.19
2004	0039	01	31.44
2004	0039	02	4.04
2004	0039	03	46.59

(Partial Results)

Linking Separate Queries

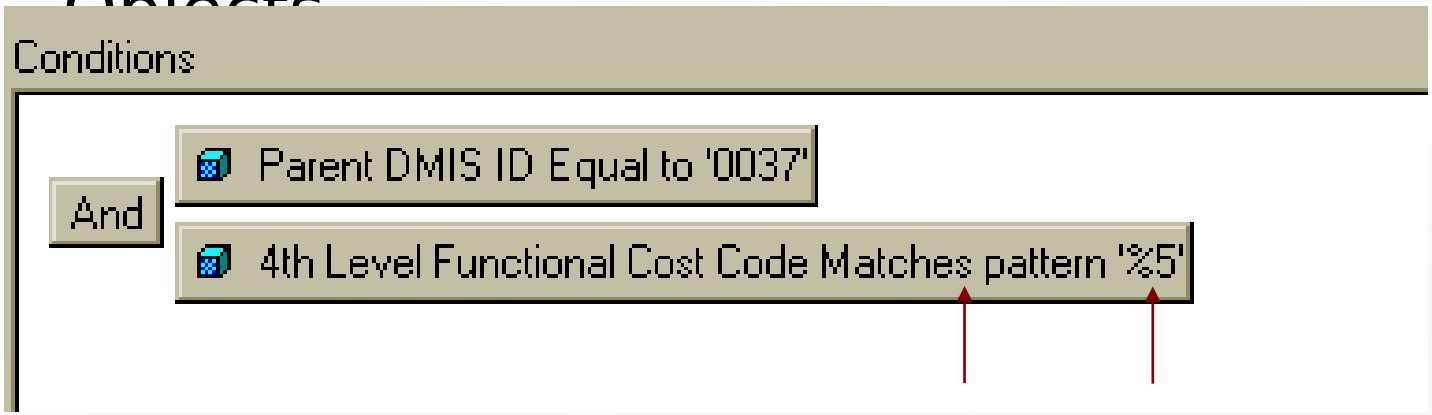
This line graph shows the comparison of the Cost per Weighted Procedures by Fiscal Month for two MTF's.



(Partial Results)

Wildcards

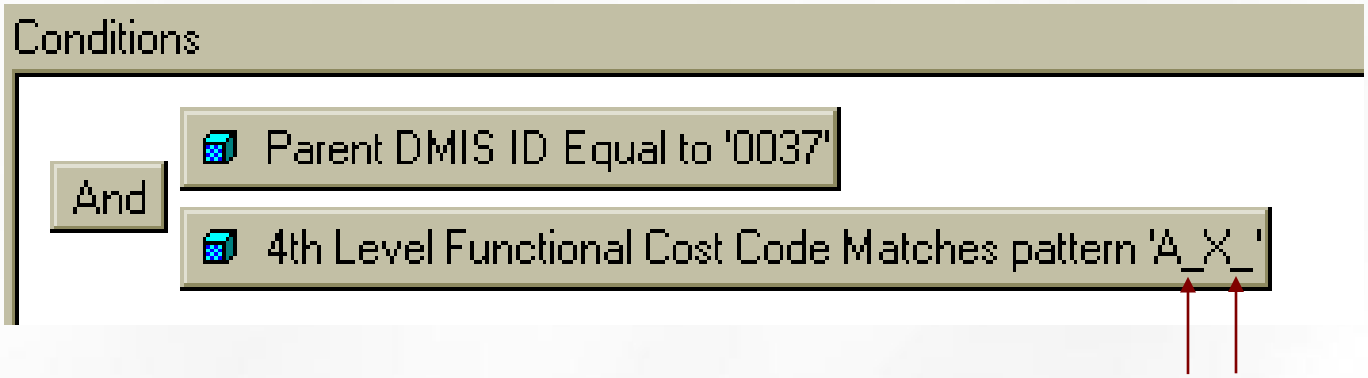
- Wildcards are used with the “Matches pattern” or “Different from pattern” operators
- Two wildcards are valid in Business Objects



- This query returns all 4th-level FCC’s ending in “5” (APVs) at DMIS ID 0037

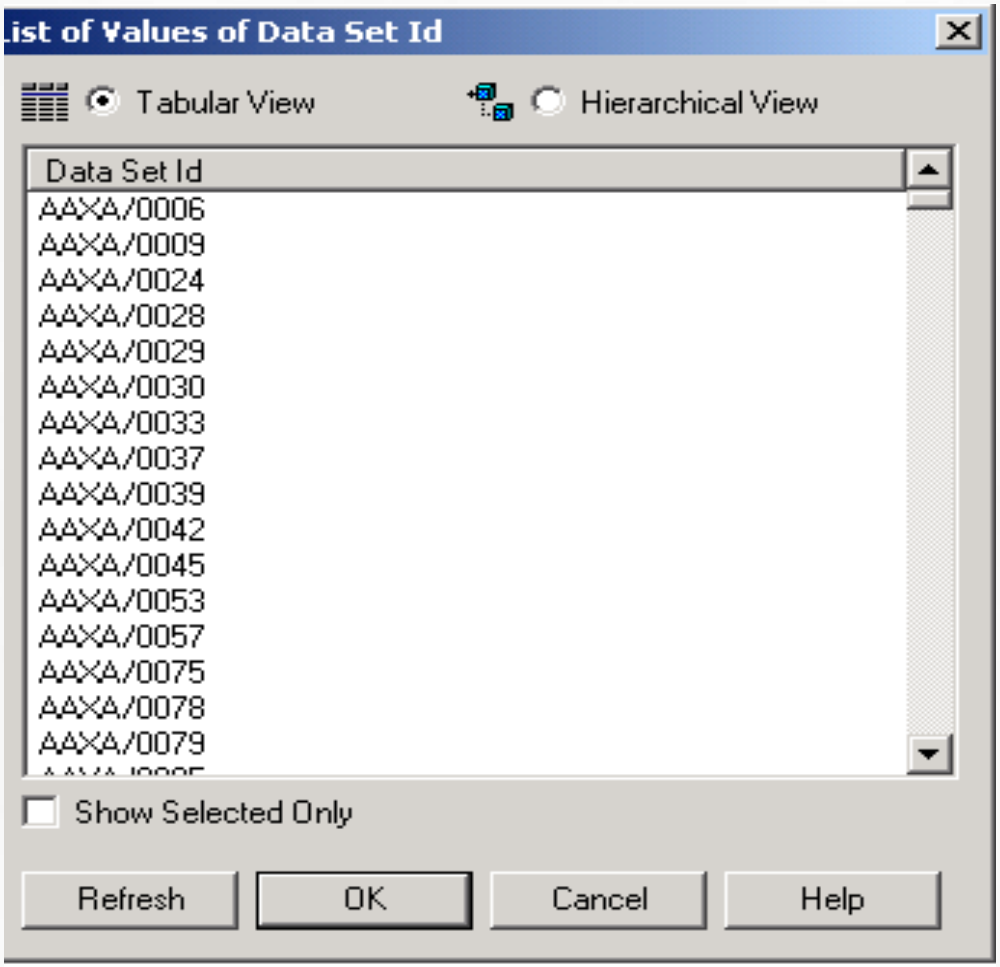
Wildcards

- The second wildcard, "_" represents specific character positions



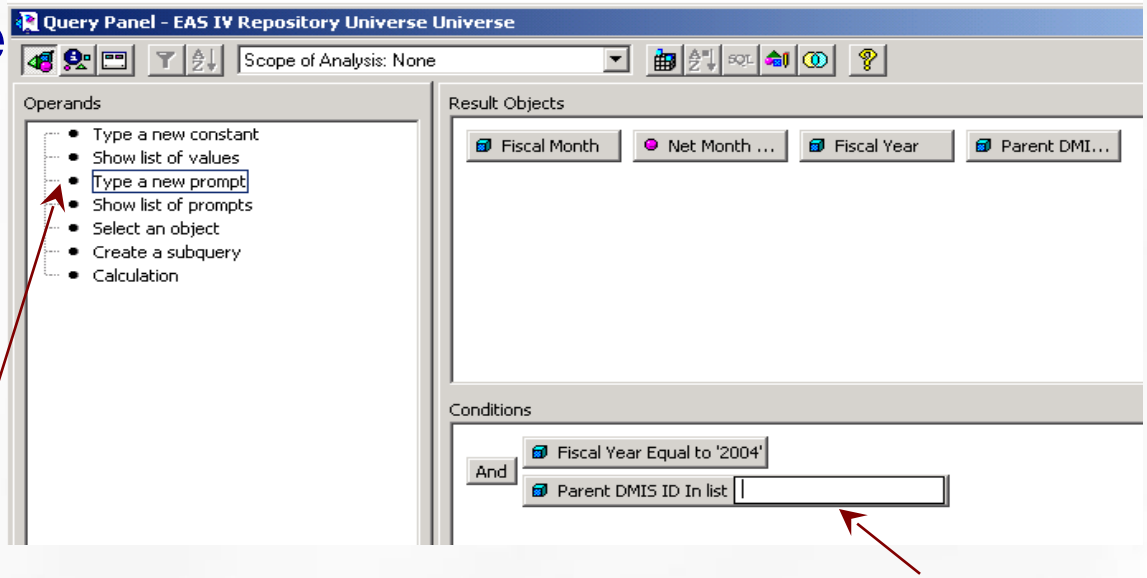
- This query returns all 4th-level FCC's beginning with "A" and having an "X" in the 3rd position (inpatient costpools) at DMIS ID 0037

Data Set ID List of Values



Prompts

Using the "Type a new prompt" ope



1. Double-click “Type a new prompt.” A text box appears next to the operator in the condition.
2. Type the prompt then press the Return key.
3. When you Run the query, the prompt appears in a dialog box.
4. Place a “;” semi-colon in between each entry i.e. 0038;0039

Query 1 Approach

Query 1 (Rx Expenses Allocated):

Results Objects:
Class 9: Fiscal Month, Net Month Expense
Class 8: Fiscal Year, Parent DMIS ID
Conditions:
Class 8: Fiscal Year **Equal to** 2004
And Class 8: Parent DMIS ID **In List** Prompt ('Enter one or more PDMIS ID's)
And Class 8: 3rd Level Functional Cost Code **Matches** **Pattern** B%
And Class 8: Providing Functional Cost Code **Matches** **Pattern** DA%

Query 1 Results

Query 1 (Rx Expenses Allocated)

Fiscal Year	Fiscal Month	Parent DMIS ID	Net Month Expense
2004	01	0038	1,778,956.86
2004	01	0039	1,944,159.36
2004	02	0038	135,615.94
2004	02	0039	221,336.76
2004	03	0038	3,321,205.13
2004	03	0039	3,322,585.96
2004	04	0038	1,570,541.64
2004	04	0039	1,969,449.89
2004	05	0038	1,385,484.09
2004	05	0039	1,622,123.91
2004	06	0038	1,444,919.74
2004	06	0039	1,954,741.41
2004	07	0038	1,663,222.40
2004	07	0039	1,665,142.14
2004	08	0038	1,362,692.16
2004	08	0039	1,717,742.18
2004	09	0038	1,501,959.47
2004	09	0039	1,983,275.45
2004	10	0038	1,434,055.59

(Partial Results)

Linking Separate Queries

1. Create a query and save the report output.

2. Right-click the Report 1 tab and select Insert Report

3. On a blank page,click Insert then Table…

4. Click anywhere on the blank report, the New Table Wizard appears. Click "Build new query…"

Query 2 Approach

Query 2 (Rx Weighted Procedures in B):

Results Objects:

Class 15: Fiscal Year, Fiscal Month, Parent DMIS ID, Weighted Statistical Amount

Conditions:

Class 15: Fiscal Year **Equal to** 2004

And Parent DMIS ID **In List** Prompt ('Enter one or more Parent DMIS ID's)

And 3rd Level Functional Cost Code **Matches Pattern** B%

And Data Set Id **Matches Pattern** DA%

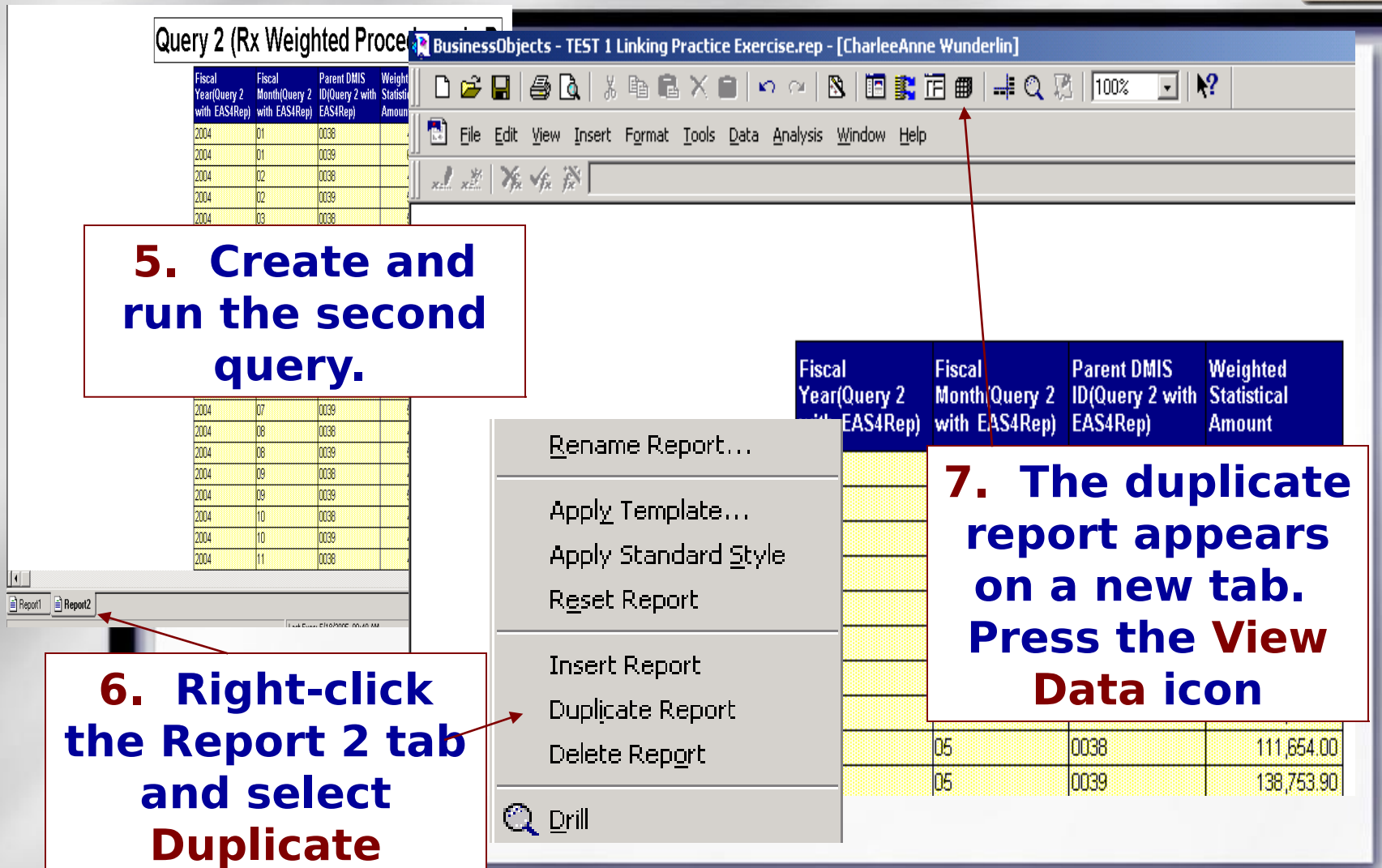
Query 2 Results

Query 2 (Rx Weighted Procedures in B

Fiscal Year(Query 2 with EAS4Rep)	Fiscal Month(Query 2 with EAS4Rep)	Parent DMIS ID(Query 2 with EAS4Rep)	Weighted Statistical Amount
2004	01	0038	48,351.00
2004	01	0039	61,833.15
2004	02	0038	45,578.20
2004	02	0039	54,836.65
2004	03	0038	52,151.85
2004	03	0039	71,312.00
2004	04	0038	48,724.80
2004	04	0039	62,528.30
2004	05	0038	48,610.00
2004	05	0039	57,456.90
2004	06	0038	56,657.40
2004	06	0039	65,971.50
2004	07	0038	51,225.60
2004	07	0039	59,465.45
2004	08	0038	45,870.00

(Partial Results)

Linking Separate Queries

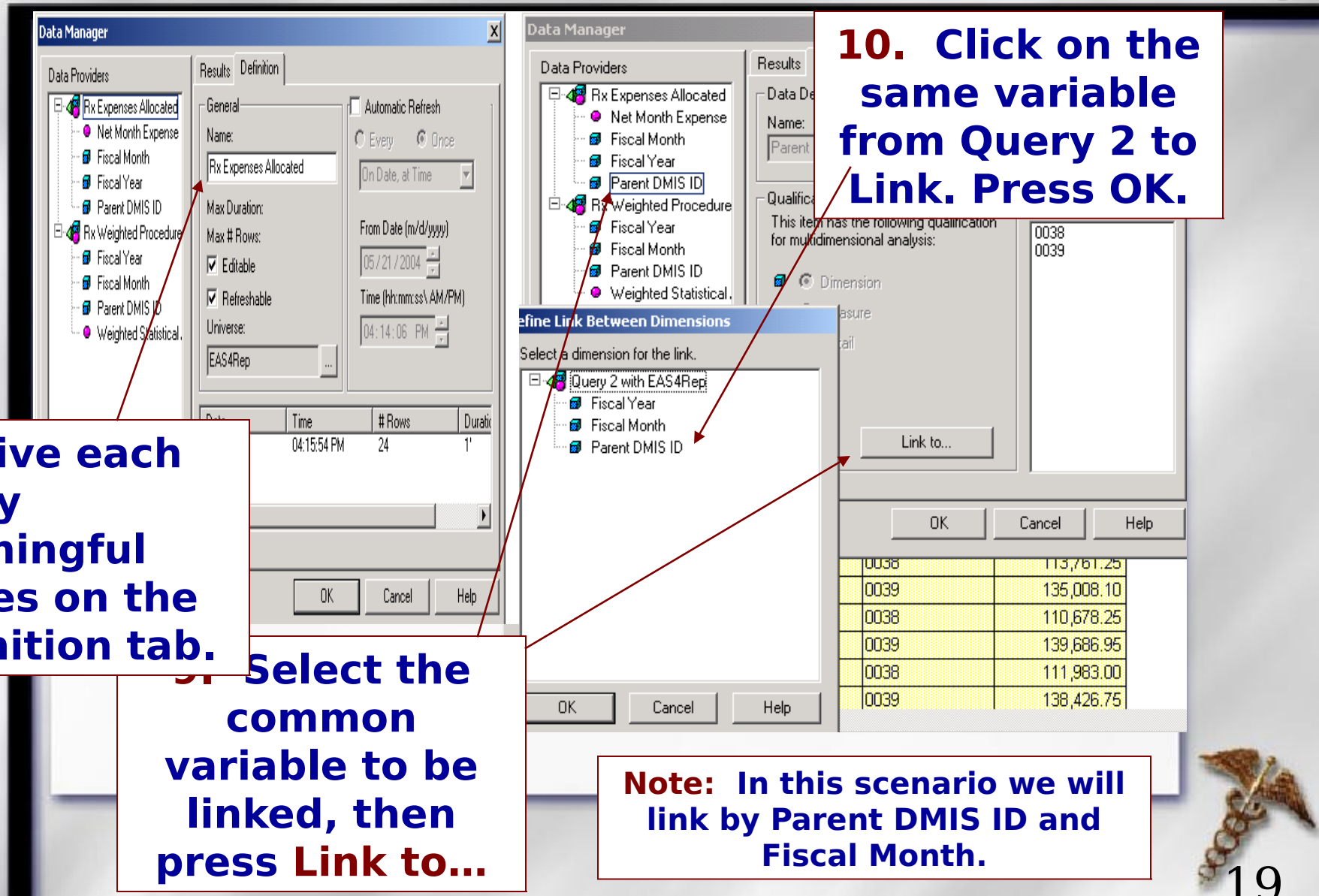


5. Create and run the second query.

6. Right-click the Report 2 tab and select Duplicate Report

7. The duplicate report appears on a new tab. Press the View Data icon

Linking Separate Queries



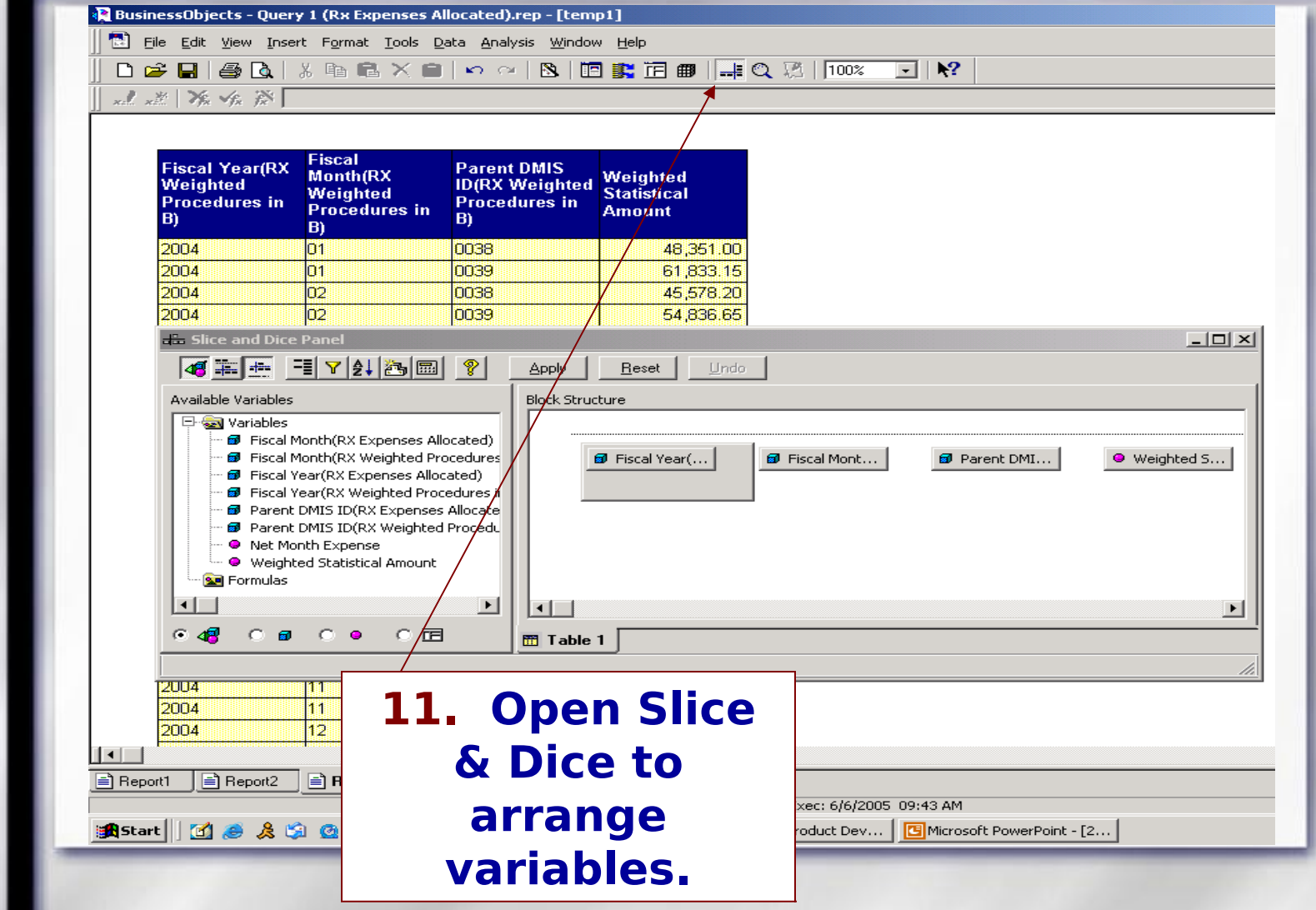
8. Give each query meaningful names on the Definition tab.

9. Select the common variable to be linked, then press Link to…

10. Click on the same variable from Query 2 to Link. Press OK.

Note: In this scenario we will link by Parent DMIS ID and Fiscal Month.

Slice and Dice



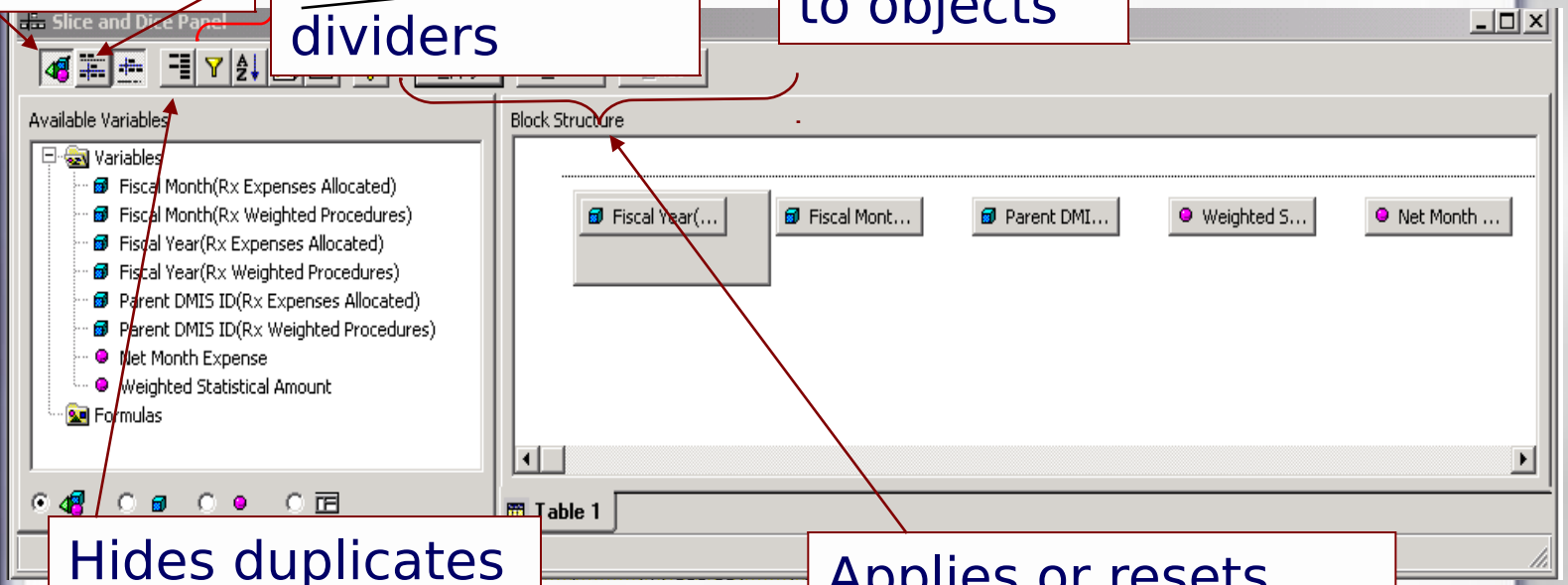
11. Open Slice & Dice to arrange variables.

Slice and Dice

Opens Report Manager window

Creates groups for headers or section dividers

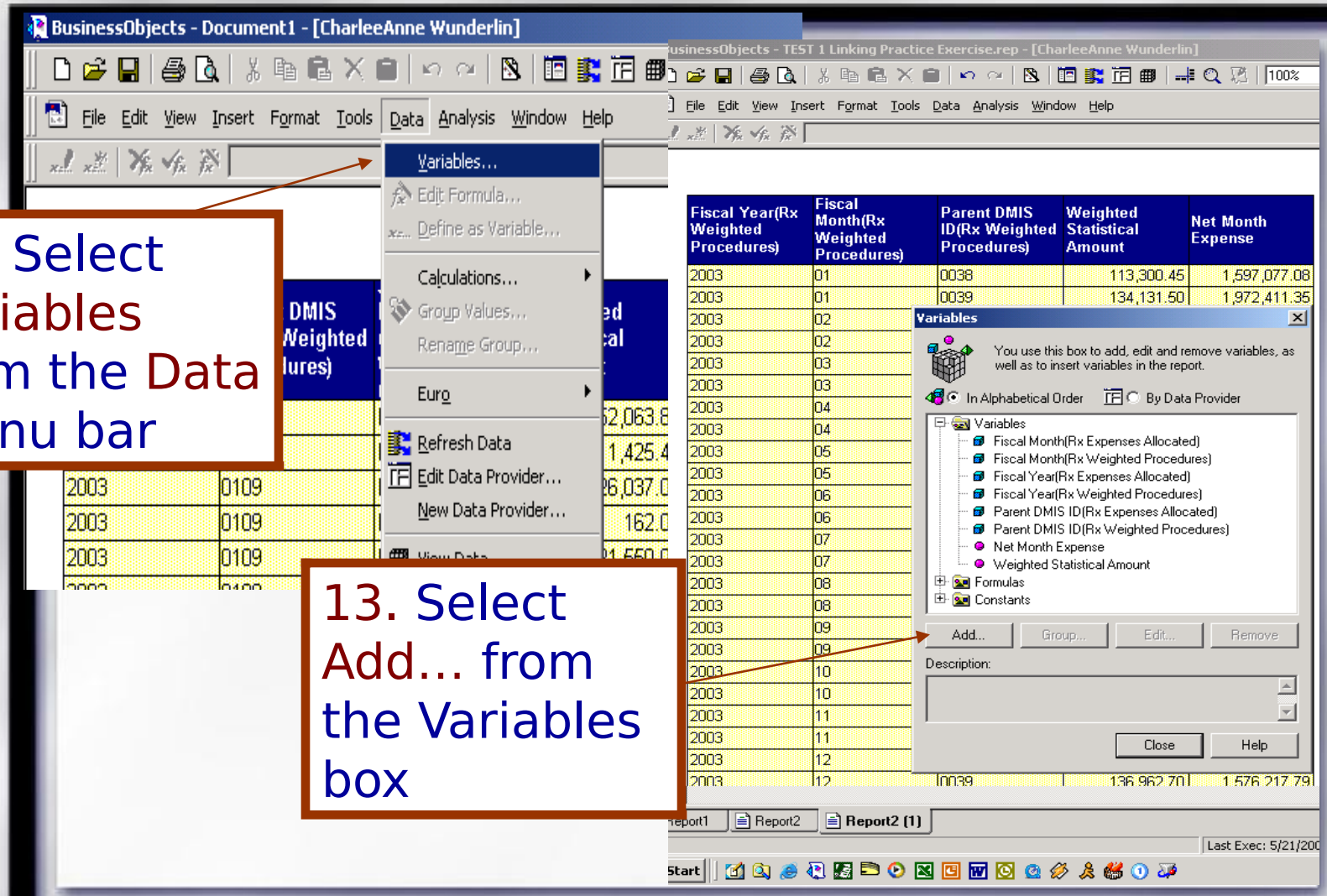
Applies filter, ranking, or calculation to objects



Hides duplicates & applies breaks

Applies or resets Slice and Dice selections

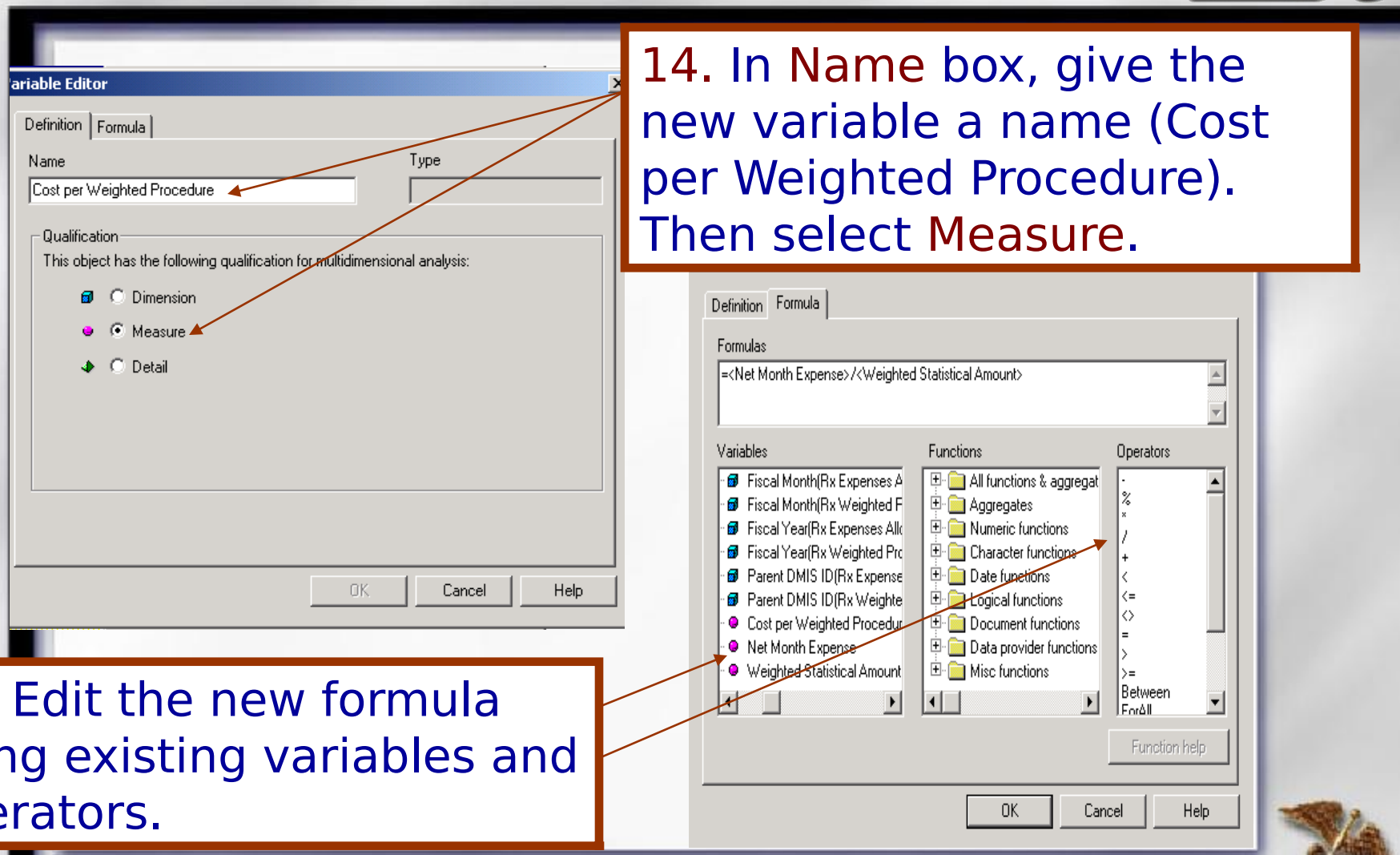
Comparing Data Across MTFs



12. Select Variables from the Data menu bar

13. Select Add... from the Variables box

Comparing Data Across MTFs

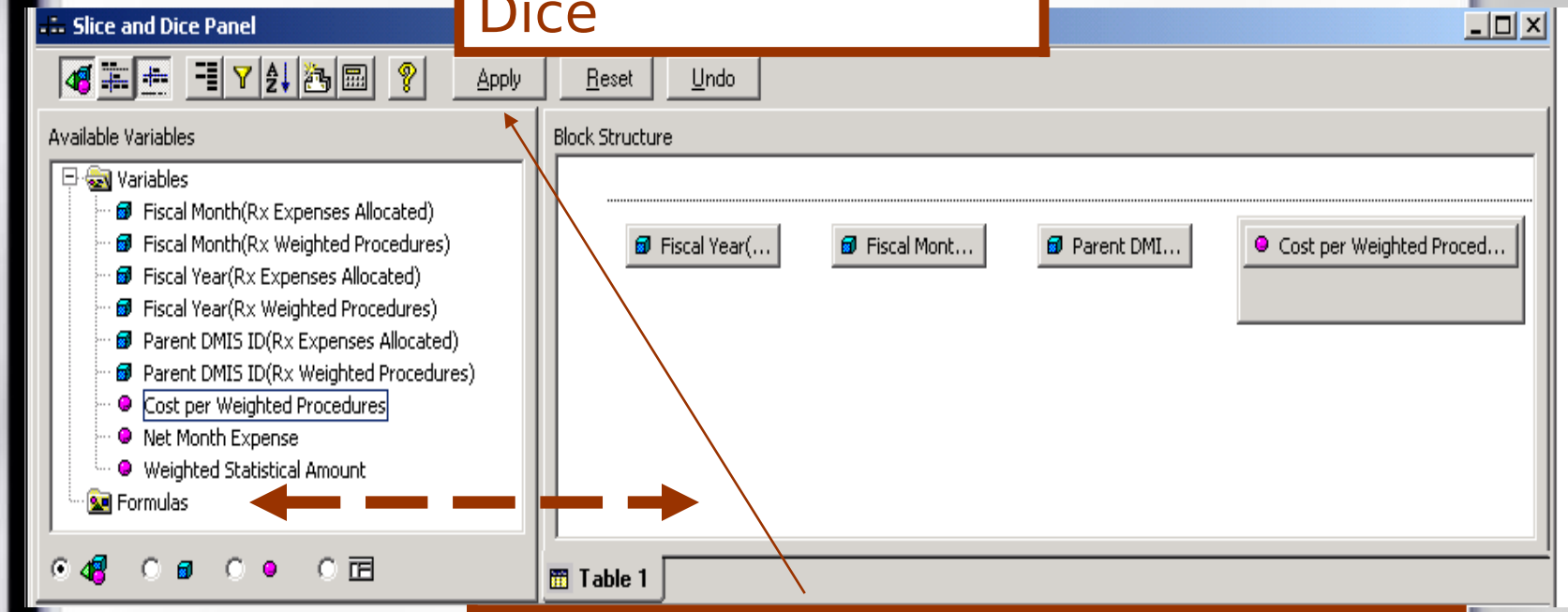


14. In Name box, give the new variable a name (Cost per Weighted Procedure). Then select Measure.

15. Edit the new formula using existing variables and operators.

Comparing Data Across MTFs

Open Slice and Dice



16. Drag variables to/from Report Manager, leaving only variables you want in the final report. Also, structure desired layout, then press Apply.

MEPRS Data Trend Analyses

BusinessObjects - Query 1 (Rx Expenses Allocated).rep - [temp1]

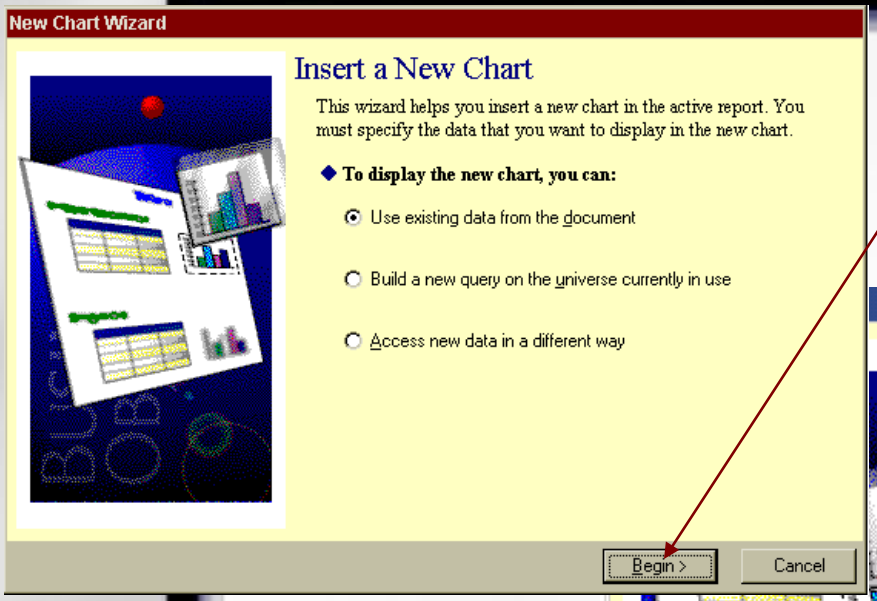
File Edit View Insert Format Tools Data Analysis Window Help

Cell...
Special Field
Row...
Column...
Chart Components
Break
Filter...
Sorts
Table...
Crosstab...
Chart...
Report
Picture...
Object...

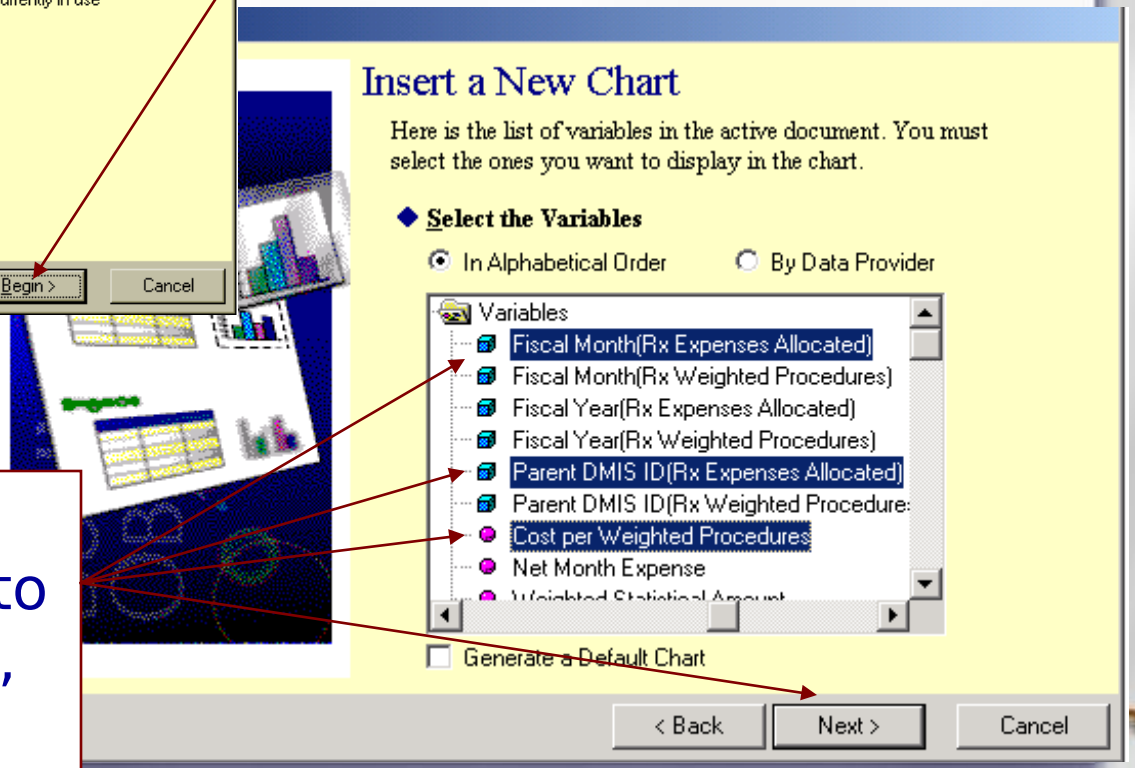
Fiscal Year(RX Weighted Procedures in B)	Parent DMIS ID(RX Weighted Procedures in B)	Fiscal Month(RX Weighted Procedures in B)	Cost per Weighted Procedure
2004	0038	01	36.79
2004	0038	02	2.98
2004	0038	03	63.68
2004	0038	04	32.23
2004	0038	05	28.50
2004	0038	06	25.50
2004	0038	07	32.47
2004	0038	08	29.71
2004	0038	09	32.94
2004	0038	10	33.22
2004	0038	11	31.58
2004	0038	12	51.19
2004	0039	01	31.44
2004	0039	02	4.04
2004	0039	03	46.59
2004	0039	04	31.50
2004	0039	05	28.23
2004	0039	06	29.63
2004	0039	07	28.00

17. Select Chart from the “Insert” drop-down menu

MEPRS Data Trend Analyses


New Chart Wizard
Insert a New Chart
This wizard helps you insert a new chart in the active report. You must specify the data that you want to display in the new chart.
To display the new chart, you can:
Use existing data from the document
Build a new query on the universe currently in use
Access new data in a different way
Begin >
Cancel

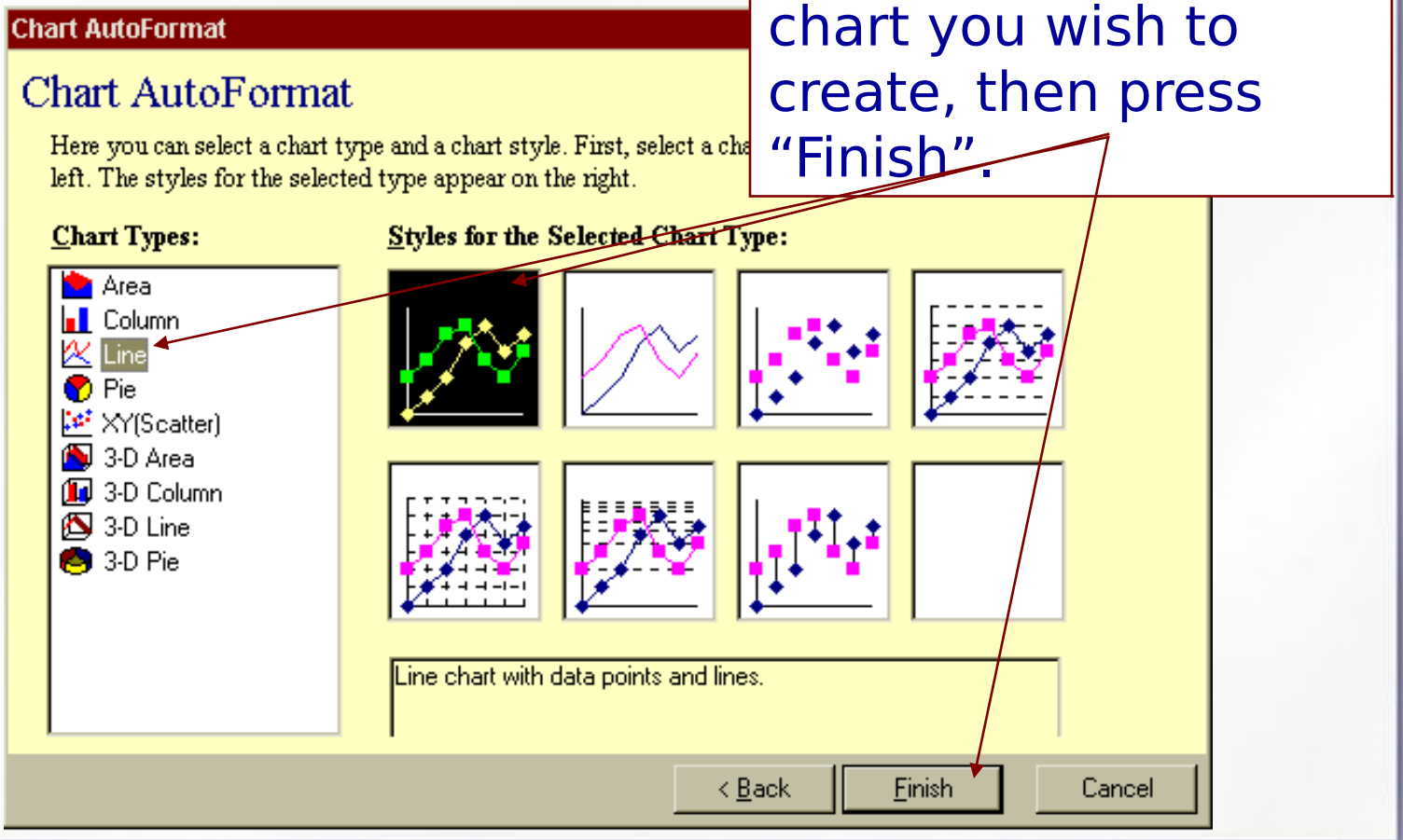
18. Follow the "New Chart Wizard" prompts


Insert a New Chart
Here is the list of variables in the active document. You must select the ones you want to display in the chart.
Select the Variables
In Alphabetical Order
By Data Provider
Variables
Fiscal Month(Rx Expenses Allocated)
Fiscal Month(Rx Weighted Procedures)
Fiscal Year(Rx Expenses Allocated)
Fiscal Year(Rx Weighted Procedures)
Parent DMIS ID(Rx Expenses Allocated)
Parent DMIS ID(Rx Weighted Procedure
Cost per Weighted Procedures
Net Month Expense
Generate a Default Chart
< Back
Next >
Cancel

19. Select the variables you wish to include in the chart, then press "Next"

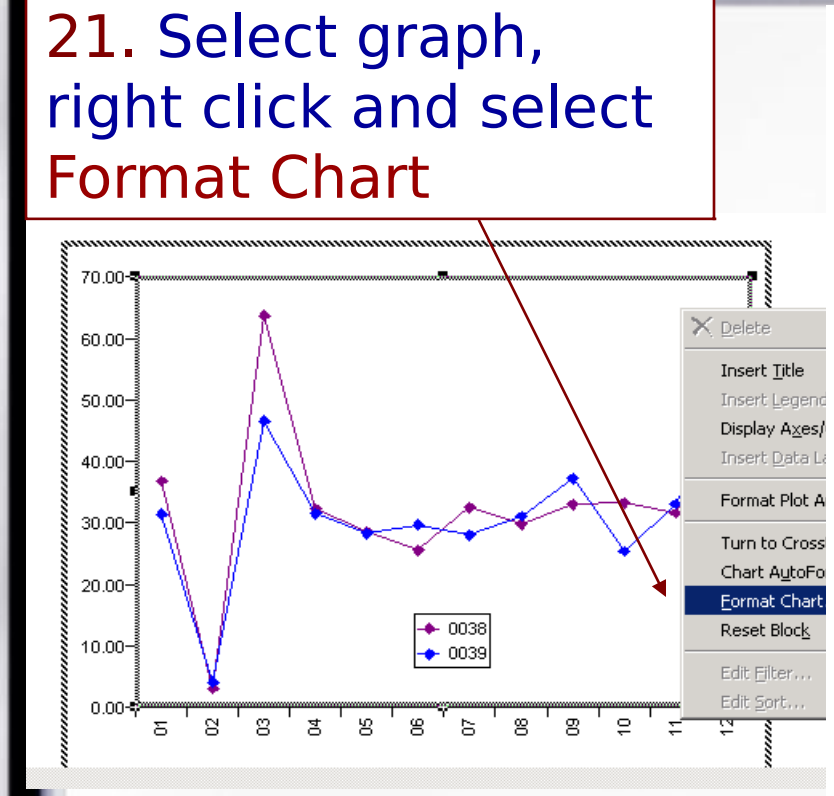
MEPRS Data Trend Analyses

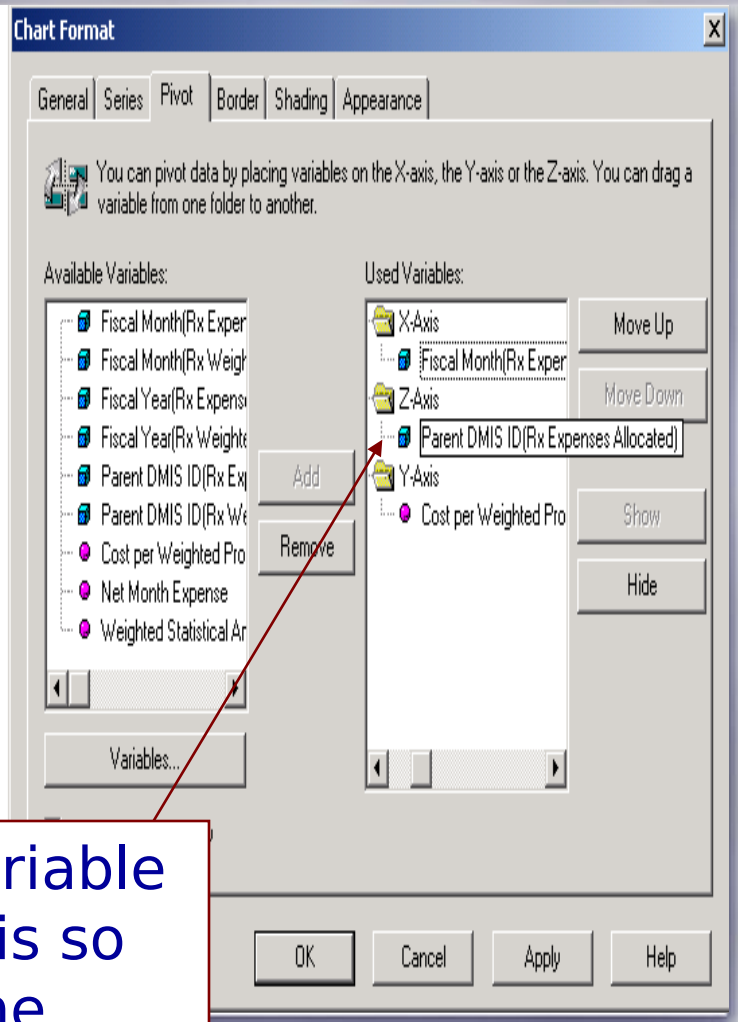
20. Select the type of chart you wish to create, then press "Finish".



MEPRS Data Trend Analyses

21. Select graph, right click and select Format Chart





22. Drag Parent DMIS ID variable from the X-Axis to the Z-Axis so both DMIS ID's appear in the graph.

Hands-on Application Exercise

Exercise

- You are interested in creating a graphical comparison between the number of Visits per Available FTE's performed by Providers by Fiscal Month in FY 2004 at Fort Sill (DMIS ID 0098) and Sheppard (DMIS ID 0113) .
- This is a metric you need to execute on a regular basis, so you prefer to build a linked query including a line graph.

Linking Separate Queries

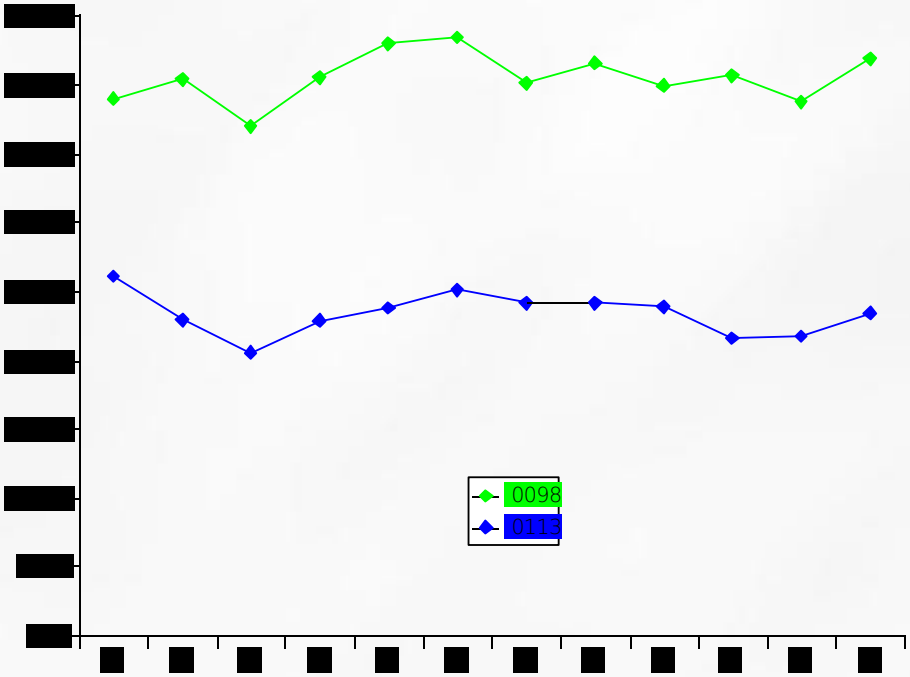
This report shows Visits per Available FTE's performed by

Fiscal Year(VISITS)	Fiscal Month(VISITS)	Parent DMIS ID(VISITS)	Visits per Available Provider FTE
2004	01	0098	389.35
2004	01	0113	260.57
2004	02	0098	403.54
2004	02	0113	229.11
2004	03	0098	369.60
2004	03	0113	205.17
2004	04	0098	404.78
2004	04	0113	228.61
2004	05	0098	429.59
2004	05	0113	237.50
2004	06	0098	433.99
2004	06	0113	250.62
2004	07	0098	401.06
2004	07	0113	241.42
2004	08	0098	415.34
2004	08	0113	241.14
2004	09	0098	399.01

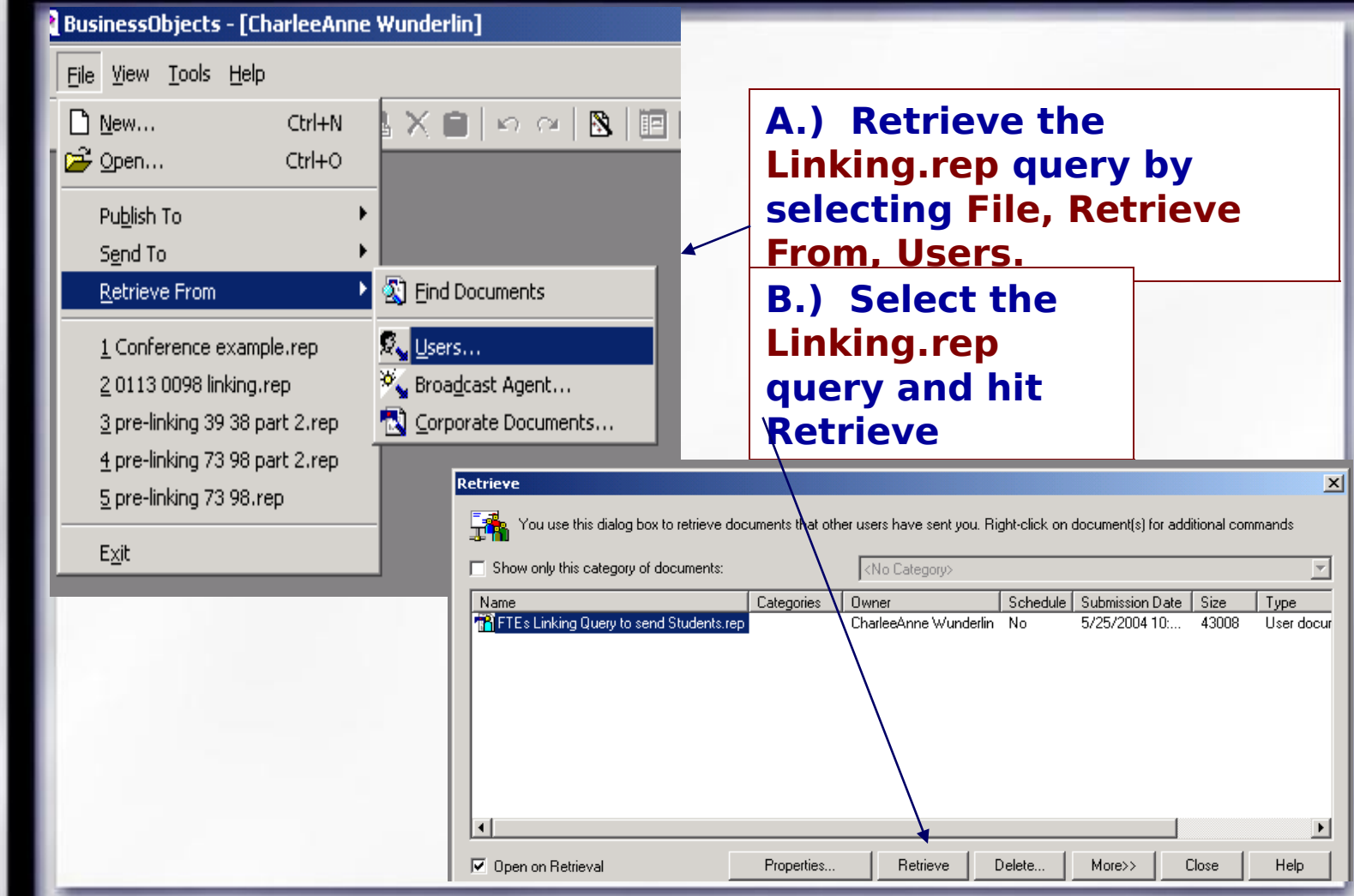
(Partial Results)

Linking Separate Queries

This line graph shows the comparison of the Visits per Provider FTE's by Fiscal Month for two MTF's.



Linking Separate Queries



Exercise : Query 1 Approach

Query 1 (Available FTE's):

Results Objects:

Class 10: Fiscal Year, Fiscal Month, Available FTE's

Class 1: Parent DMIS ID

Conditions:

Class 10: Fiscal Year **Equal to** 2004

And Class 10: Skill Type Code **In List** 1,2

And Class 1: Parent DMIS ID **In List Prompt** (Enter one or more Parent DMIS ID's)

And Class 03: 3rd Level Functional Cost Code **Matches Pattern** B%

Or Class 03: 3rd Level Functional Cost Code **Equal to** FBN

Exercise 1: Query 1 Results

Query 1:
FTE's

! Be careful when pulling FTE's from EASIV. Must divide by the number of Months pulled if **Fiscal Mont**

Fiscal Year	Parent DMIS ID	Fiscal Month	Available FTE
2004	0098	01	83.68
2004	0098	02	70.68
2004	0098	03	79.89
2004	0098	04	79.12
2004	0098	05	72.76
2004	0098	06	87.90
2004	0098	07	87.70
2004	0098	08	79.26
2004	0098	09	83.15
2004	0098	10	73.13
2004	0098	11	80.60
2004	0098	12	77.81

(Partial Results)

Exercise 1: Query 2 Approach

Query 2 (Visits):

Results Objects:
Class 21: Fiscal Year, Fiscal Month, Parent DMIS ID, Total Visits
Conditions:
Class 21: Fiscal Year **Equal to** 2004 **And** **Parent DMIS ID In List Prompt** (Enter one or more PDMIS ID's)

Exercise 1: Query 2 Results

Query 2 (Visits)

Fiscal Year(Query 2 with EAS4Rep)	Fiscal Month(Query 2 with EAS4Rep)	Parent DMIS ID(Query 2 with EAS4Rep)	Total Visits
2004	01	0098	32,581.00
2004	01	0113	12,385.00
2004	02	0098	28,522.00
2004	02	0113	10,633.00
2004	03	0098	29,527.00
2004	03	0113	11,342.00
2004	04	0098	32,026.00
2004	04	0113	12,489.00
2004	05	0098	31,257.00
2004	05	0113	12,730.00
2004	06	0098	38,148.00
2004	06	0113	14,175.00
2004	07	0098	35,173.00
2004	07	0113	12,957.00
2004	08	0098	32,920.00

(Partial Results)

Steps to Link Queries

1. Create ***(Retrieve)*** Query 1 with Prompt & save the report
2. Right-click Report 1 and select Insert Report
3. On blank screen, click Insert then Table
4. New Table Wizard appears. Click “build new query….”
5. Create and run 2nd query with Prompt
6. Right-click Report 2 and select Duplicate Report
7. Press the view Data icon
8. Give each query meaningful names on Definition tab
   (Query 1 = FTE’s
   Query 2 = Visits)
9. Select common variable to be linked, then press “Link to”
   (Parent DMIS ID & Fiscal Month)
10. Click any other variables to be linked
11. Go to Slice & Dice to arrange variables

Steps to Link Queries

12. Select “Variables” from the Data menu bar
13. Select “Add” from the Variables box
14. In the Name box, give the new variable a name ***(Visits per FTE).*** Select Measure
15. Edit the new formula using existing variables and operators ***(Visits / FTE)***
16. Open Slice & Dice to include necessary variables ***(Visits per FTE)***
17. Select “Chart” from the Insert drop-down menu
18. Follow the “New Chart Wizard” prompts
19. Select variables to include in the chart ***(Fiscal Month, Parent DMIS ID, Visits per FTE)***
20. Select the type of chart and press “Finish”
21. Select graph, right click and select “Format Chart”
22. Move Parent DMIS ID to “Z” axis on graph.

Unit Objectives

After completing this module, workshop participants will be able to:

- ✓ Create Linked Reports
- ✓ Insert Prompts
- ✓ Create new variables
- ✓ Perform Calculations
- ✓ Use Slice and Dice
- ✓ Create Graphs

EASIV Repository II: Advanced Business Objects and Metrics

Questions?

Comments?

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